

**DATE:** January 9, 2003

**TO:** Consultants

**FROM:** Gary W. Moon

**SUBJECT:** RFQs for Environmental and Engineering Services for the Interstate 215 (I-215) South Project

cc: Arlis Childs  
Greg Hefter  
Valerie Timmins  
File

This letter is SANBAG's notification that two Requests for Qualifications (RFQ), regarding professional services for the I-215 South Project will be issued shortly. One RFQ will be issued to select a consultant to provide environmental services. The second RFQ will be issued to select a consultant to provide engineering services. The purpose of each RFQ and a brief description of the anticipated scope of services are as follows.

***RFQ to provide environmental services*** – The purpose of this RFQ is to select a qualified candidate to provide environmental services consistent with developing an EIR/EIS culminating in a Record of Decision for the I-215 South Project. In addition, the consultant will be required to provide on-call services as needed. The consultant will be responsible for coordinating efforts with the engineering consultant, the San Bernardino Associated Governments/San Bernardino County Transportation Authority (SANBAG), the California Department of Transportation (Caltrans), the Riverside County Transportation Commission (RCTC), and the Cities of Grand Terrace, Colton, and San Bernardino.

***RFQ to provide engineering services*** – The purpose of this RFQ is to select a qualified candidate to provide engineering services consistent with establishing a preferred alternative for the project. In addition, the consultant will be required to provide oncall services as needed. The consultant will be responsible for coordinating efforts with the environmental consultant, SANBAG, Caltrans, RCTC, and the Cities of Grand Terrace, Colton, and San Bernardino.

The general project limits are from Interstate 10 (I-10) to State Route (SR 60). **Please note that no materials (e.g. plans or studies) will be available for consultants to review.**

Interested firms are invited to submit Statements of Qualifications (SOQs) for either one or both contracts. It should be noted however, respondents that submit for both RFQs are required to submit a separate and independent SOQ for each RFQ.

Those firms or individuals intending to submit a Statement of Qualification (SOQ) should note the schedule contained in Section XI of the RFQ. It is our intention, subject to approval of the SANBAG Board, to have the selected firm under contract by **May 2003**.

Individuals and firms submitting SOQs for this project will be evaluated based on qualifications and experience on similar and relevant projects. Emphasis will be placed on the capabilities of key project individuals.

For each RFQ, the following will be posted on the SANBAG's website for your reference: the RFQ, ***draft*** Scope of Services, a sample contract, and SANBAG's Consultant Selection Policy. These items may be found on SANBAG's website ([www.sanbag.ca.gov](http://www.sanbag.ca.gov)) under "Latest RFP/RFQ Postings." This information will be posted on the Internet site on or about **Wednesday, January 29, 2003**. Please regularly check the website for this information as well as schedule updates, scope changes, general questions and answers, and other additional information.

Eight (8) copies of the SOQ must be submitted to SANBAG's San Bernardino office by **12:00 P.M., Thursday, February 20, 2003**.

Proposals and correspondence shall be directed to:

Mr. Gary W. Moon  
Director of Freeway Construction  
San Bernardino Associated Governments  
444 North Arrowhead Avenue, Ste. 203  
San Bernardino, California 92401

All questions and comments regarding these Requests for Qualifications shall be directed to:

Mr. Arlis Childs  
Project Manager  
(909) 889-8611 x149

GWM:AFC:dmo

**SAN BERNARDINO COUNTY TRANSPORTATION AUTHORITY/  
SAN BERNARDINO ASSOCIATED GOVERNMENTS  
(SANBAG)**

**REQUEST FOR QUALIFICATIONS**

**TO**

**PROVIDE  
ENVIRONMENTAL SERVICES**

**FOR**

**INTERSTATE 215 (I-215) SOUTH PROJECT**

**IN**

**THE CITY OF RIVERSIDE, RIVERSIDE COUNTY, and  
THE CITIES OF GRAND TERRACE, COLTON, AND SAN BERNARDINO,  
SAN BERNARDINO COUNTY**

Issued: January 29, 2003

**SAN BERNARDINO ASSOCIATED GOVERNMENTS/  
SAN BERNARDINO COUNTY TRANSPORTATION AUTHORITY**

**REQUEST FOR QUALIFICATIONS**

**FOR**

**ENVIRONMENTAL SERVICES  
INTERSTATE 215 (I-215) SOUTH PROJECT**

**I. INTRODUCTION**

The San Bernardino Associated Governments (SANBAG), acting as the San Bernardino County Transportation Authority, is soliciting Statement of Qualifications (SOQ) from qualified firms for environmental services in support of the I-215 South Project. This project scope will involve environmental services consistent with obtaining the necessary environmental approvals for compliance with the California Environmental Quality Act (CEQA) and the National Environmental Policy Act (NEPA). This will likely consist of developing Draft and Final Environmental Impact Reports (EIR) and Environmental Impact Statements (EIS), culminating in an approved Record of Decision (ROD) for the I-215 South Project. In addition, the consultant will be required to provide on-call services as needed.

Voters in San Bernardino County approved Measure I in November 1989 enacting a one-half cent sales tax for transportation purposes over a 20-year period. SANBAG, which has existed as the County Transportation Commission since 1975, is designated as the Agency to administer the program.

All contracts will be awarded without discrimination based on race, religion, color, age, sex, or national origin.

The selection criteria for this RFQ have been altered from that of the typical SANBAG selection. Typically SANBAG has placed emphasis on a Consultant's understanding of the specific project. Because of the nature of this project, SOQs will be judged on the firm's past project experience and on the relevant experience of personnel proposed. Consultants are discouraged from doing extensive research, conceptual layouts, or environmental analysis. Consultants should, however, become familiar with existing conditions within the general project limits. **Major emphasis will be placed on the Consultant's past experience and the relevant experience of proposed personnel when scoring and selecting a consultant. The presentation of extensive geometric layouts or other specific project studies in the SOQ or formal presentation will be viewed negatively by the selection panel.**

## **II. PROJECT AND SERVICES DESCRIPTIONS**

SANBAG is seeking the services of a qualified environmental consultant to provide environmental services consistent with obtaining the necessary environmental approvals for CEQA and NEPA compliance. This will most likely consist of developing Draft and Final EIR/EIS documents, culminating in an approved ROD for the I-215 South Project, as described below. Environmental information may be used in a Project Report (PR). The PR will be developed under a separate engineering contract, thus, close coordination with the engineering consultant will be required. Further, the selected environmental consultant will provide on-call support as needed throughout the duration of the project.

The general project limits extend along I215 from just south of the existing I215/SR-60 interchange in Riverside to Orange Show Road, north of the existing I-215/I-10 interchange in San Bernardino. The project limits will also include an area on SR-60 extending east and west of the existing SR-60/I-215 interchange to consider HOV flyovers connecting the two freeways. The project limits are within the Cities of Riverside, Grand Terrace, Colton, and San Bernardino.

See the scope of services included with this RFQ package for a more detailed description of the project requirements.

## **III. MATERIALS FURNISHED BY SANBAG**

Please note that materials (e.g. project specific plans or studies) will **NOT** be available for consultants to review.

## **IV. CALTRANS/SANBAG/RCTC RELATIONSHIP**

SANBAG will work closely with Caltrans and RCTC on the I-215 project. SANBAG will be responsible for, and will be the **sole** point of contact for all contractual matters. Caltrans will be responsible for providing technical oversight of the consultant's work efforts, through SANBAG. The consultant shall take direction **only** from SANBAG and shall regularly inform SANBAG of progress and of all outstanding issues.

## **V. CONTRACT TYPE**

A task order based, not to exceed cost reimbursable plus percentage **earned** fee contract, will be issued. Any services provided by the Consultant which are not specifically covered by a Contract task order will not be reimbursed. It is the Consultant's responsibility to recognize and notify SANBAG when services not covered under the Contract task order have been requested or are required.

The terms of the Contract will be effective for the duration of the project.

## **VI. POLICY GOVERNING MINORITY BUSINESS OPPORTUNITIES**

No goals have been established for contracts with Disadvantaged Business Enterprises (DBE), Women-owned Business Enterprises (WBE), or Disabled Veterans Business Enterprises (DVE) in contracting activities. Because Measure I and Measure A funds, and not Federal funds, will be utilized for the contract, no goals have been established.

## **VII. STATEMENT OF QUALIFICATIONS INSTRUCTIONS**

Statement of Qualifications (SOQ) will be accepted until **12:00 PM, February 20, 2003**. Eight (8) copies are required. SANBAG reserves the right to accept or reject late SOQ's at its discretion. Acceptance of a late submittal shall not be construed to mean that SANBAG will accept any late SOQ. SOQ's shall be delivered to:

Mr. Gary Moon  
Director of Freeway Construction  
San Bernardino Associated Governments  
444 North Arrowhead Avenue, Suite 203  
San Bernardino, CA 92401

SOQ's must contain the information listed below and must be compiled in the following format:

### **A. Cover Letter**

Provide the following information:

- Summary description of the work to be performed by firm and each subconsultant firm proposed for the project and an estimate of the percentage of work to be performed by each firm.
- The location of the offices where the services are to be performed. If services are to be shared among firms and offices at different locations, indicate where each office is located and what services are to be performed in each office. For field personnel provide the location of the office where they will be based and from which office they will be managed.
- In accordance with SANBAG Policy No. 11000-R8, Sect. 7.1.2.f, provide a response to the following question: Has your firm ever been terminated from a contract? If the answer is yes, see item C below.
- A memorandum from a principal from each subconsultant firm indicating the specific portion of services the subconsultant will be performing.

### **B. Local Presence Report:**

For consultant and each subconsultant proposing to perform services from their San Bernardino County Office, provide the following business activity information:

- Firm name, address, telephone number, and fax number.
- Name of office principal and title.

- Date office was established in San Bernardino County.
- Number of personnel employed in the San Bernardino office.
- Approximate percentage of work performed on projects within San Bernardino County.
- Representative projects completed within San Bernardino County, date completed, and approximate billings.
- Number of senior management and regular employees working full time out of the San Bernardino County Office.
- Names of personnel proposed to be engaged on the contracted services and their county of residence (informational purposes only).

**See SANBAG's Local Preference Policy and Local Presence Report sample format (enclosed).**

C. Contract Termination Circumstances:

If consultant has ever been terminated from a contract, describe the facts and circumstances in detail.

D. Organizational Chart:

- Show the relationships between personnel and support staff who are expected to participate on the project.
- For each person, indicate the firm with whom they are employed.
- Show the aspects of the services each person will be responsible for performing.

E. U. S. General Services Administration Standard Form SF255:

“Architect-Engineer and Related Services Questionnaire for Specific Project”. The Form SF255 must conform to the following format:

1. Provide a separate Form SF255 for the prime consultant and each subconsultant. Section 9 is not required. Subconsultants need not supply Sections 6 and 10.
2. Prime consultants should list subconsultants in Section 6.
3. List key personnel in Section 7. Section 7 must conform to the following requirements:
  - Every person whose resume is provided in Section 7 must also be shown on the organizational chart. Resumes of persons who are not shown on the organization chart will not be considered.
  - Section 7b must describe the function the person will be expected to fulfill in connection with the project.
  - Section 7f must list the person's active registrations in California, with the California Registration Number. Personnel (Project Managers /Engineers) in

responsible charge of engineering services must be registered Civil Engineers in the State of California. Personnel in responsible charge of surveying services must be registered land surveyors or have a Civil Engineer license to do land surveying in the State of California.

- Section 7g should provide a brief history of each person's relevant project experience, including descriptions of his/her role and tasks that he/she performed on each project. Also, identify key tasks each person is expected to perform for these projects under his/her assigned function.

4. Section 8 should conform to the following requirements:

- Projects listed in Section 8 must be projects worked on by personnel shown on the organizational chart and whose resumes are included in Section 7. For each project listed, the personnel included in Section 7 who worked on the project, and their project position must be shown.
- In Section 8b, describe the nature of the firm's responsibility and indicate whether the firm was the prime consultant or a subconsultant.
- In Section 8c, include the owner's telephone number and the name of a contact person who can provide a reference. Also include the name and telephone number of the primary contact for the prime consultant, if necessary. Projects without references and telephone numbers will not be considered. List no more than ten projects.
- In Section 8e, indicate the project value, the contract value, and the respective values (project and contract) for which the firm was responsible.
- Additional information may be provided in Section 8 to highlight or expand on experience from projects that are especially applicable to the proposed Scope of Services, including an indication of the scope of related services for which the consultant was responsible.

5. Section 10 typically requires the CONSULTANT to provide a detailed discussion of the work tasks and management activities necessary for project completion, **however**, as stated in the Introduction, CONSULTANT shall **only** provide their understanding of the existing conditions within the general project limits.

F. Contract Comments:

Provide a written discussion of any objections or concerns relative to the Terms and Conditions of SANBAG's contract. Please note that SANBAG reserves the right to disqualify any consultant that does not provide a complete written discussion of its contractual objections or to disqualify any consultant based on objections that SANBAG considers non-negotiable. SANBAG does not anticipate making substantive changes to its Terms and Conditions.

G. Entire Statement of Qualifications:



The Consultant's SOQ package shall be limited to 40 (8 1/2" x 11") pages single-sided. The page limit does not include the outside cover, section dividers, cover letters and subconsultant commitment memorandum, local presence reports, contract comments, or duplication of the organizational chart. SOQ's that do not contain the required information or do not contain the required number of copies, eight (8), may not be accepted.

H. Changes:

During the selection process, any changes in key consultant or subconsultant personnel proposed in the SOQ must be brought to the attention of SANBAG immediately.

**VIII. CONSULTANT SELECTION**

The Primary objective of SANBAG is to select highly qualified firms to perform necessary professional services for SANBAG at a fair and reasonable cost. Firms may obtain a copy of SANBAG's Contracting and Procurement policy by contacting SANBAG. In addition, SANBAG has established the following criteria for the selection process:

- A. The selection process shall be fair, open, and competitive.
- B. The selection of the consultant firms will be based on clearly stated objectives.
- C. Selection of private consultants/firms shall be based upon demonstrated competence, professional qualifications, experience, and capabilities to perform the required services at a fair and reasonable price to SANBAG, rather than competitive bidding process.
- D. Firms located in San Bernardino County shall receive significant preference in the selection process in order to encourage business to locate and remain in San Bernardino County.
- E. Upon review of the SOQ's, a shortlist of firms will be invited to prepare for an interview. The pending contract will be awarded to the responsible, responsive firm best conforming to the RFQ, and is in the opinion of SANBAG, most advantageous to SANBAG. SANBAG reserves the right to reject any and all SOQ's and to negotiate with any responsible, responsive firm. SANBAG is under no obligation to issue contracts for the subject services.

## **IX. NEGOTIATIONS AND ENGAGEMENT**

Following the selection of a consultant, the selected firm will submit a cost proposal and participate in contract negotiations with SANBAG staff. Please refer to the attached consultant selection schedule in Section XI. The final contract and Scope of Services will be negotiated. Consultants are **required** to include in their SOQ any comments relating to the Scope of Services and/or the Terms and Conditions of SANBAG's standard contract or to state that there are no comments. SANBAG reserves the right to disqualify any firm that does not provide written discussions of any disagreements it has relative to SANBAG's Terms and Conditions. SANBAG does not anticipate making any substantive changes to its Terms and Conditions.

## **X. CONFLICT OF INTEREST**

The selected consultant will not be prevented from participating in future projects to the extent that no direct conflict of interest exists at the time. Consultants currently under contract on SANBAG projects are not specifically precluded from participating in this RFQ. In accordance with Caltrans directives, firms responsible for a project's design may not directly participate in construction inspection of that project. The determination of a conflict of interest, direct or incidental, shall be at the discretion of SANBAG.

## **XI. SCHEDULE FOR CONSULTANT SELECTION**

Issue Request for Qualifications	January 29, 2003
Statement of Qualifications Due	February 20, 2003
Shortlist and Notify Consultants	February 28, 2003
Interview Shortlisted Consultants	March 14, 2003
Select Consultant	March 14, 2003
Contract Cost Proposal Due	March __, 2003
Major Projects Approval (anticipated)	April __, 2003
SANBAG Board Approval (anticipated)	May __, 2003
Notice to Proceed (anticipated)	May __, 2003

Dates are subject to change. Schedule updates will be posted on SANBAG's website: [www.sanbag.ca.gov](http://www.sanbag.ca.gov) under "Latest RFP/RFQ Postings."

### **Contact List:**

Questions/Comments	Arlis Childs	(909) 889-8611 x149
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*Sample Document - other formats may be submitted*

**LOCAL PRESENCE REPORT**  
**CONSULTANT BUSINESS ACTIVITY INFORMATION**

TO: SAN BERNARDINO ASSOCIATED GOVERNMENTS

RE: REQUEST FOR QUALIFICATIONS  
CONSULTING SERVICES  
INTERSTATE 215 SOUTH ENVIRONMENTAL SERVICES

Name of Firm \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_ FAX \_\_\_\_\_

Name of Office Principal \_\_\_\_\_

Title \_\_\_\_\_

Date Local Office Established \_\_\_\_\_

Number of personnel employed at this office \_\_\_\_\_

Approximate volume of work performed on projects within San Bernardino County \_\_\_\_\_ %

Representative projects completed within San Bernardino County:

<u>Project</u>	<u>Date completed</u>	<u>Approx billings</u>
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

(Use additional sheets if required)

**CONSULTANT BUSINESS ACTIVITY INFORMATION** (cont)

Name of Firm\_\_\_\_\_

Indicate number of senior management and regular employees working out of the San Bernardino office:

<u>Position</u>	<u>Number</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

FOR INFORMATIONAL PURPOSES ONLY  
(The following shall not be used in determining local preference credit)

Personnel proposed to be engaged on the contracted services:

<u>Name</u>	<u>County of Residence</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

(Use additional sheets if required)